## USDA Weekly Retail Turkey Feature Activity

Fri. Sep 28, 2012

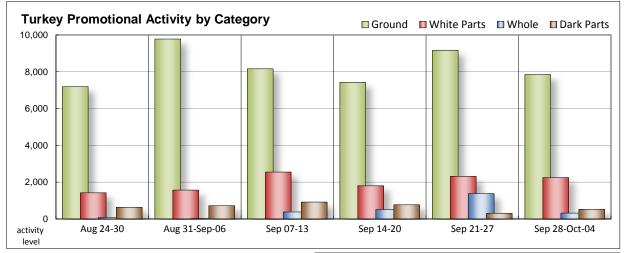
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/28 thru 10/04.

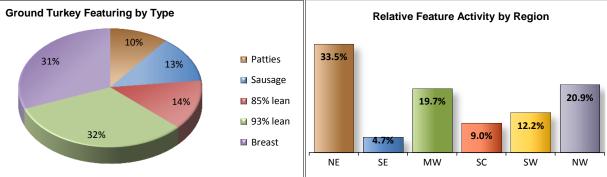
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh unless otherwise noted;											
NATIONAL SUMMARY											
	THIS	WEEK	LAST	WEEK	LAST YEAR						
Feature Rate 1/	35.9%	of 22,500	40.7%	of 22,500	37.4% of 19,500						
reature Kate	ou	tlets		tlets	outlets						
Special Rate 4/	0	.0%	3.	.5%	2.0%						
Activity Index 2/	12	,900	14	,230	12,560						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
WHOLE BIRDS:											
Fresh - Hens					230	1.74					
" - Toms					230	1.74					
Frozen - Hens	160		780		240	1.20					
" - Toms	160	1.18	600	0.99	10	1.39					
PARTS:											
Breast:											
Bone-in, whole											
Fresh	10		190		720	2.59					
Frozen	1,090	1.85	690	1.83	640	1.67					
Split, bone-in											
Fresh			170								
Rotisserie	210		800	6.96	390	7.29					
Boneless, whole	60	5.59			40	4.99					
Cutlets	150	5.02	350	4.91	880	4.68					
Cutlets, thin sliced	100	4.99			20	5.36					
Strips											
Tenders	630	4.46	110	4.91							
Marinated Tenders	810	4.24	290	4.41	290	4.22					
Drumsticks	20	1.79	60	1.94	420	1.79					
Thighs	10	1.98	40	2.19	40	2.07					
Wings	20	1.99	40	1.72	320	1.82					
Necks	10	1.59	10	1.69	10	1.39					
Smoked Drumsticks	160	1.94	50	2.16	10	1.79					
Smoked Wings	160	1.77	60	2.01	90	2.17					
Smoked Necks	140	1.69	40	1.89							
GROUND TURKEY:	7,850	3.43	9,170	2.90	7,330	3.02					
Patties	820	3.59	870	3.32	460	3.03					
Sausage	1,000		860		930	3.06					
85% lean	1,070		3,730		1,420	2.31					
93% lean	2,530	3.01	3,300	2.99	3,090	2.82					
Breast	2,430		410		1,430	4.13					
Rolls (frsh/frz 1 lb.)	370	2.68	190	1.34	30	1.83					
Specialty 5/											
Patties	40		130		140	4.07					
93-94% lean	480	_	_		310	4.55					
Breast	260		20		170	6.26					
Note: rolls & specialty not included in ground turkey total and weighted average.											

This Week's Turkey Feature Highlights

Retail activity slows on turkey items, increases on deli items. Retailers seem to have lost interest in whole turkeys; offerings are fewer in number this week. Frozen bone-in breasts are more actively promoted; prices are slightly higher. There are fewer rotisserie breasts in the circulars and they will cost more. For shoppers looking for boneless white parts, tenders and marinated tenders are the way to go; offerings increase and prices decline, the perfect combination. Featuring increases on smoked dark parts and prices decline, so this might be a good option for dinner. Ground turkey promotional activity declines. The 93% lean still gets the most ad space, but offerings increase on ground breast and almost match the activity level of 93% ground turkey. Deli activity increases, although fewer stores are promoting deli. Featuring is more active on service deli thick slicing meats; prices are lower. There are fewer ads on thin slicing meats and value products. Self-service deli promotions increase on private brands, slow on processor brands.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTI	HEAST U.S.		SOUT	THEAST U.S.		MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  36.1% of 4,000 sampled outlets				
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,V	VV)					
Feature Rate 1/	67.4% of 4,40	0 sampled outlet	ts	13.0% of 6,0	000 sampled outle	ets					
Special Rate 4/	0.0% of stores w	•		· ·	w/ no-price prom		0.0% of stores w	-			
Activity Index <sup>2/</sup>		Index = 5,410			y Index = 1,040			Activity Index = 2,900			
Activity macx	Price Range	Summar	V	Price Range	Summa	nrv	Price Range Summary				
	(\$/pound)		Vtd Avg	(\$/pound)		Wtd Avg	(\$/pound)		Wtd Avg		
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens							1.18	160	1.18		
" - Toms							1.18	160	1.18		
PARTS:											
Breast:											
Bone-in, whole											
Fresh	3.29	10	3.29								
Frozen	1.49 - 1.99	330	1.94	1.28 - 1.97	200	1.94	0.99 - 1.99	470	1.77		
Split, bone-in											
Fresh											
Rotisserie	6.89 - 9.99	90	7.49								
Boneless, whole	5.29 - 7.99	60	5.59								
Cutlets	4.99	90	4.99				4.69 - 5.45	30	5.08		
Cutlets, thin sliced	4.99	100	4.99								
Strips											
Tenders	4.55	20	4.55				4.69 - 4.79	30	4.74		
Marinated Tenders	4.26 - 4.66	350	4.45	2.66	130	2.66	3.99 - 5.33	260	4.94		
Drumsticks	1.59	10	1.59				1.98	10	1.98		
Thighs							1.98	10	1.98		
Wings	1.59 - 2.59	20	1.99								
Necks	1.59	10	1.59								
Smoked Drumsticks	1.99	140	1.99				1.50 - 1.69	20	1.60		
Smoked Wings	1.79	140	1.79				1.50 - 1.69	20	1.60		
Smoked Necks	1.69	140	1.69								
GROUND TURKEY:											
Patties	3.49 - 4.99	200	3.99	3.18	10	3.18	2.99 - 3.99	430	3.43		
Sausage	2.79 - 3.99	420	3.04	2.80 - 3.99	60	3.22	2.86 - 3.68	300	3.41		
85% lean	1.99 - 3.19	530	2.60	1.99 - 3.19	340	2.18	2.49 - 2.63	30	2.56		
93% lean	1.92 - 3.84	1,320	3.04	2.50 - 3.19	240	2.96	2.50 - 3.99	500	3.09		
Breast (99-100% lean)	3.84 - 6.15	920	4.82	3.84	40	3.84	3.99 - 4.79	120	4.51		
Rolls (frsh/frz 1 lb.)							1.89 - 2.50	100	2.38		
Specialty <sup>5/</sup>											
Patties	3.99	40	3.99								
93-94% lean	3.99 - 5.99	340	4.47	3.33	20	3.33	4.69	120	4.69		
Breast	4.49 - 7.49	130	7.04				5.99 - 7.49	130	7.39		





(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

		ENTRAL U.S.				HWEST U.S.			NORTHWEST U.S.			
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,L	JT)		(C	A,HI,NV)		(AK,ID,MT,OR,WA,WY)				
Feature Rate 1/	22.8% of 4,00	0 sampled outlets	;	4	00 sampled out	tlets	68.3% of 1,200 sampled outlets					
Special Rate 4/	0.0% of stores w/	no-price promoti	ons	0.0%	of stores v	// no-price pror	motions	0.0% of stores w/ no-price promotions				
Activity Index 2/	Activity I	ndex = 1,330		Activity	Index = 1,300		Activity Index = 920					
·	Price Range	Summary		Price Range		Summary				Sumn	mary	
	(\$/pound)	Stores Wtd Avg		(\$/pound)		Stores Wtd Avg		(\$/pound)		Stores	Stores Wtd Avg	
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens												
" - Toms												
PARTS:												
Breast:												
Bone-in, whole												
Fresh												
Frozen	1.59 - 1.79	80	1.69						1.99	10	1.99	
Split, bone-in												
Fresh												
Rotisserie					7.99	120	7.99					
Boneless, whole												
Cutlets	4.69 - 5.17	30	5.07									
Cutlets, thin sliced												
Strips												
Tenders	4.69	10	4.69	3.99	- 5.03	260	4.98		3.99	310	3.99	
Marinated Tenders				3.19	- 3.99	50	3.30		3.99	20	3.99	
Drumsticks												
Thighs												
Wings												
Necks												
Smoked Drumsticks												
Smoked Wings												
Smoked Necks												
GROUND TURKEY:												
Patties	3.49 - 3.50	160	3.50		3.99	20	3.99					
Sausage	2.86 - 2.87	150	2.87	3.27	- 4.99	20	3.87	3.19	- 3.90	50	3.55	
85% lean	2.48 - 2.66	150	2.63		2.39	10	2.39		2.33	10	2.33	
93% lean	2.80 - 3.00	290	2.88		- 3.19	180	2.83					
Breast (99-100% lean)	3.99 - 4.79	430	4.67		- 4.79	600	4.05	3.99	- 4.79	320	4.18	
Rolls (frsh/frz 1 lb.)	2.08	30	2.08	2.29	- 2.33	40	2.32		2.99	200	2.99	
Specialty <sup>5/</sup>												
Patties												
93-94% lean												
Breast												



## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Sep 28, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 09/28 thru 10/04.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHEAST U.S.		SOUTHEAST U.S.				
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,	(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
	65.5% o	f 22,500	79.1% o	f 22,500	<b>71.2</b> % o	f 19,500							
Feature Rate 1/	sto	res	sto	res	sto	res	84.6%	84.6% of 4,400 sampled outlets		69.2% of 6,000	69.2% of 6,000 sampled outlets		
Activity Index 2/	45	020	43,	470	38	410	Ac	Activity Index = 15,150			ndex = 9,340		
Activity mack 21	43,	020	45,	470	30,	410	Price Rang		nmary	Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	
SERVICE DELI - Turkey													
Category 1	0.470	7 70	F 700	0.05	4.000	7.00	5.00	0.05	7.00	0.00	0.040	7.70	
Processor Brand	8,170	7.78	5,720	8.05	4,030	7.82 7.90	5.99 - 9.9 5.99 - 8.9			6.98 - 8.99	3,610 50	7.73	
Private Brand	3,030	6.98	1,510	7.20	2,030	7.90	5.99 - 8.9	9 2,110	6.89	5.99 - 6.99	50	6.69	
Category 2  Processor Brand	4,130	5.76	5,020	6.12	5,050	5.72	4.98 - 6.9	9 1,310	5.74	4.99 - 6.99	450	6.29	
Private Brand	2,140	5.70	2,180	6.22	3,230	6.30	4.99 - 7.9	- /-		4.99 - 6.99	60	6.64	
Category 3	2,140	0.00	2,100	0.22	0,200	0.00	4.00 7.0	1,040	0.70	4.00 0.00		0.04	
Processor Brand	680	3.80	1,360	3.89	960	4.14	3.48 - 3.9	9 70	3.95	3.99	240	3.99	
Private Brand	1,500	5.46	1,700	4.72	220	4.64	3.98 - 3.9						
Turkey Ham	,		,										
Processor Brand	550	4.02	350	3.40	380	3.16	3.99 - 4.9	9 360	4.56	4.99	20	4.99	
Private Brand					20	3.79							
Turkey Pastrami													
Processor Brand	660	4.54	330	3.97	260	4.56	3.99 - 7.9	9 410	4.99	4.99	20	4.99	
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,020	7.77	3,930	7.20	2,720	7.62	5.99 - 8.9	9 1,590	8.02	5.99 - 8.99	520	7.85	
Private Brand	1,430	7.10	1,440	6.97	890	7.22	6.99 - 7.4	9 1,160	7.08				
Category 2													
Processor Brand	140	4.87	470	6.28	250	4.79							
Private Brand	10	4.94	160	5.99									
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz Processor Brand	6,680	3.14	7,440	2.96	8,290	3.20	2.50 - 4.0	0 1,540	3.38	2.50 - 3.99	930	3.13	
Processor Brand Private Brand	2,570	3.14	7,440 1,720	2.96 3.05	8,290 1,960	2.86	2.50 - 4.0			2.50 - 3.99	1,270	3.13	
Turkey 16 oz	2,370	3.04	1,720	3.03	1,960	2.00	2.99 - 3.0	0 310	3.00	2.00 - 3.50	1,270	3.11	
Processor Brand	1.770	4.27	1,810	4.85	50	5.09	3.99 - 6.2	9 210	0 4.67				
Private Brand	.,,,,	7.21	.,010	7.00	00	3.03	3.00 0.2		7.07				
Chicken 7-10 oz													
Processor Brand	6,060	3.18	6,610	2.94	6,830	3.20	2.50 - 4.0	0 1,440	3.37	2.50 - 3.99	900	3.14	
Private Brand	2,480	3.04	1,720	3.05	1,240	2.80	2.99 - 3.0			2.00 - 3.50	1,270	3.11	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHWEST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/									
- Catale Nate		sampled outlets		sampled outlets	62.6% of 2,900 sampled outlets	65.7% of 1,200 sampled outlets			
Activity Index 2/		ndex = 7,140		ndex = 4,590	Activity Index = 6,350	Activity Index = 2,450			
	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range Summary (\$/pound) Stores Wtd Avg	Price Range Summary (\$/pound) Stores Wtd Avg			
SERVICE DELI - Turkey	(φ/ροατία)	Stores With Avg	(φ/ροαπα)	Stores Wid Avg	(\psi/pouria) Stores Wita Avg	(φ/pourid) Stores Wita Avg			
Category 1									
Processor Brand	5.99 - 8.99	690 7.05	6.99 - 10.99	60 9.97	7.99 - 8.49 210 8.04	5.99 - 12.99 350 8.03			
Private Brand	5.99 - 8.49	410 6.27	5.99 - 8.49	210 6.72	8.99 - 9.49 250 9.24				
Category 2									
Processor Brand	4.98 - 6.99	580 5.84	3.99 - 5.29	1,250 5.71	4.99 - 6.00 470 5.27	5.98 - 6.00 70 5.99			
Private Brand	5.49 - 5.99	560 5.98	5.99	240 5.99	5.99 240 5.99				
Category 3									
Processor Brand	3.29 - 4.49	370 3.66							
Private Brand	5.99	80 5.99	4.99 - 5.99	360 5.67	3.29 - 5.99 610 5.30	5.99 320 5.99			
Turkey Ham									
Processor Brand	3.49 - 5.49	20 4.82	1.99 - 2.99	30 2.34	1.79 - 2.99 120 2.50				
Private Brand									
Turkey Pastrami									
Processor Brand	3.49 - 5.49	220 3.63	4.99	10 4.99					
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.98 - 9.99	450 6.95	5.98 - 7.99	360 7.08	6.99 10 6.99	6.99 - 10.99 90 9.69			
Private Brand	6.99 - 9.99	250 7.10	7.99	20 7.99					
Category 2									
Processor Brand	3.98 - 4.99	140 4.87							
Private Brand	3.69 - 5.99	10 4.94							
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz	4.00	4 000	4.00	000 040	0.40 4.40 4.000 0.00	0.00 4.40 0.50 0.00			
Processor Brand	1.99 - 3.99	1,200 2.81	1.99 - 2.69	680 3.19	2.49 - 4.49	2.69 - 4.49 650 3.63			
Private Brand Turkey 16 oz	2.50 - 2.99	380 2.63	3.00	120 3.00	2.99 - 3.49 490 3.24				
Processor Brand	3.99 - 4.99	210 4.61	3.99 - 5.99	480 4.44	3.99 550 3.99	3.99 320 3.99			
Private Brand	J.33 - 4.33	210 4.01	0.55 - 0.55	4.44	3.99 300 3.99	3.99			
Chicken 7-10 oz									
Processor Brand	1.99 - 3.99	1,190 2.81	1.99 - 2.99	650 3.20	2.49 - 4.49 1,230 3.08	2.69 - 4.49 650 3.63			
Private Brand	2.50 - 2.99	380 2.63	3.00	120 3.00	2.99 - 3.49 490 3.24				
1 Tivate Bland	2.00 2.00	2.03	0.00	120 0.00	2.00 0.40 400 0.24	<u> </u>			

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)